

MOBILE SOLUTIONS FOR GERMANY'S HEALTHCARE SYSTEM

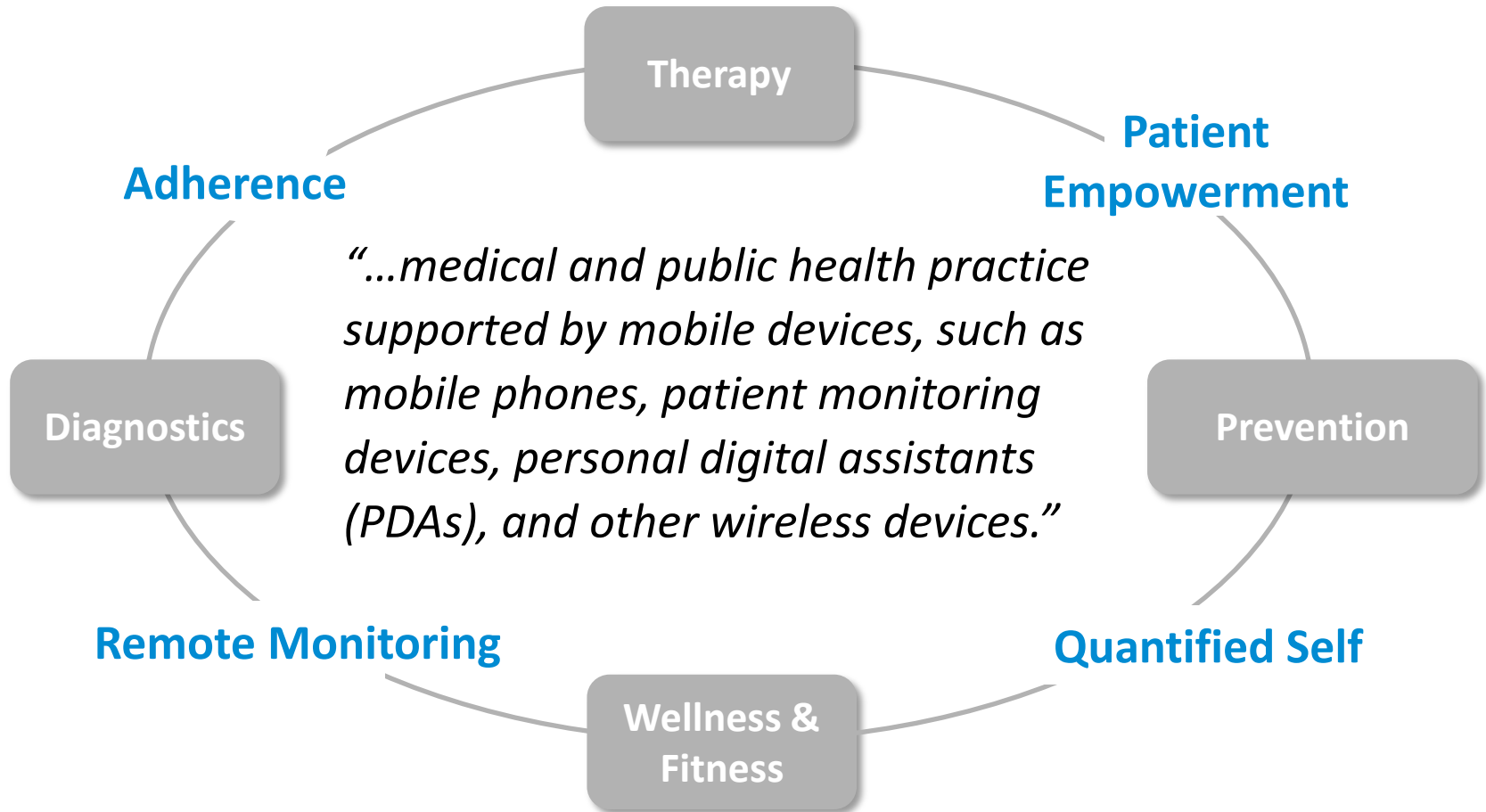
WEBINAR
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What are we talking about?



Source: World Health Organization 2011

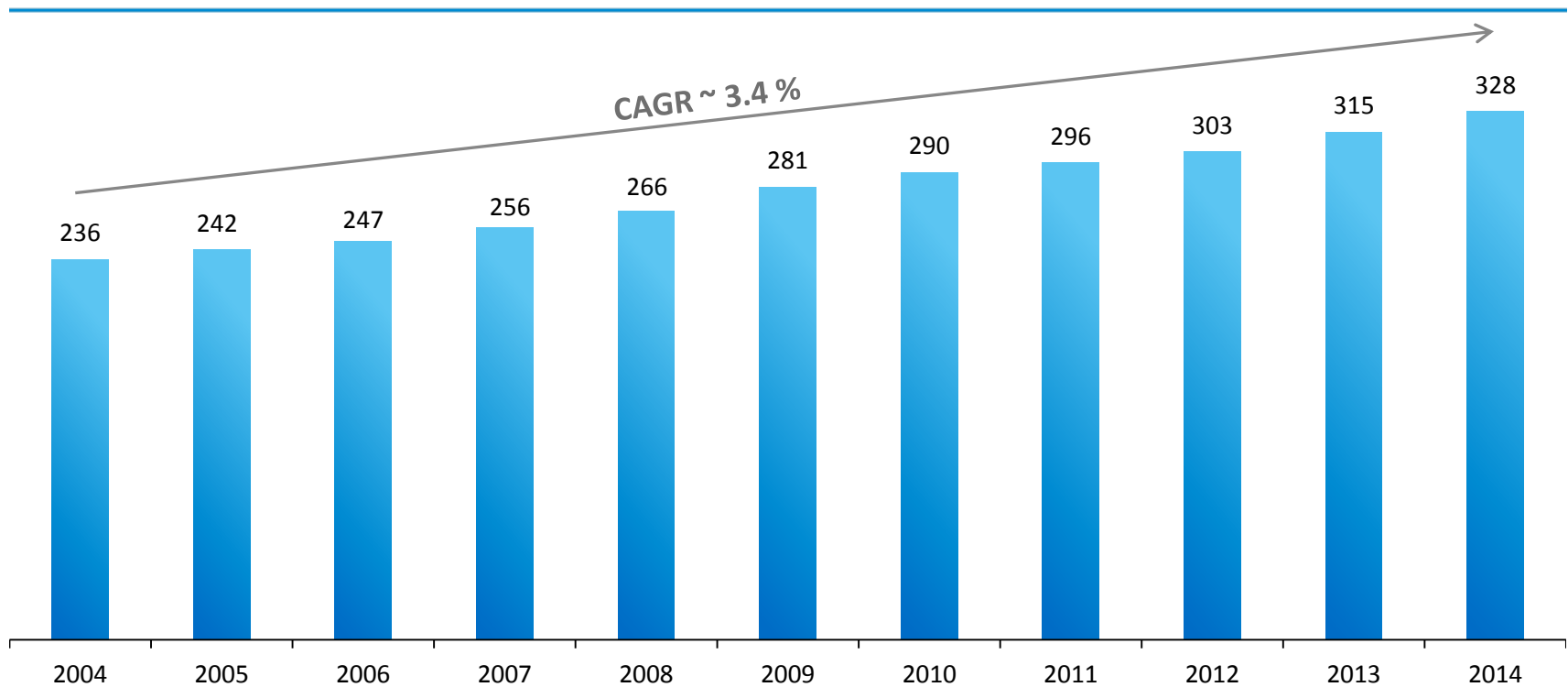
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Why do we need them?

Germany's Healthcare Market

Healthcare expenditure in Germany exceeded the EUR 300 billion mark

Healthcare expenditure in Germany 2004 - 2014 (in EUR billion)



Source: Statistisches Bundesamt 2015

Demographic Challenges

Growing demand for healthcare services drives the development of mobile healthcare solutions in Germany



Aging Society

- 2035: 24 million people aged 65 years or older (31 percent of the population)



Care Dependency

- 2020: 2.5 to 3 million
- 2050: 3.25 to 4 million



Chronic Diseases

- Chronic and long-term diseases account for about 80 percent of German healthcare spending (EUR 200 billion).
- Within 14 years the number of people with diabetes mellitus has risen from 5.8 to 7.2 million people.

Source: DB Research 2010, Statista 2014, Statistische Bundesamt 2014

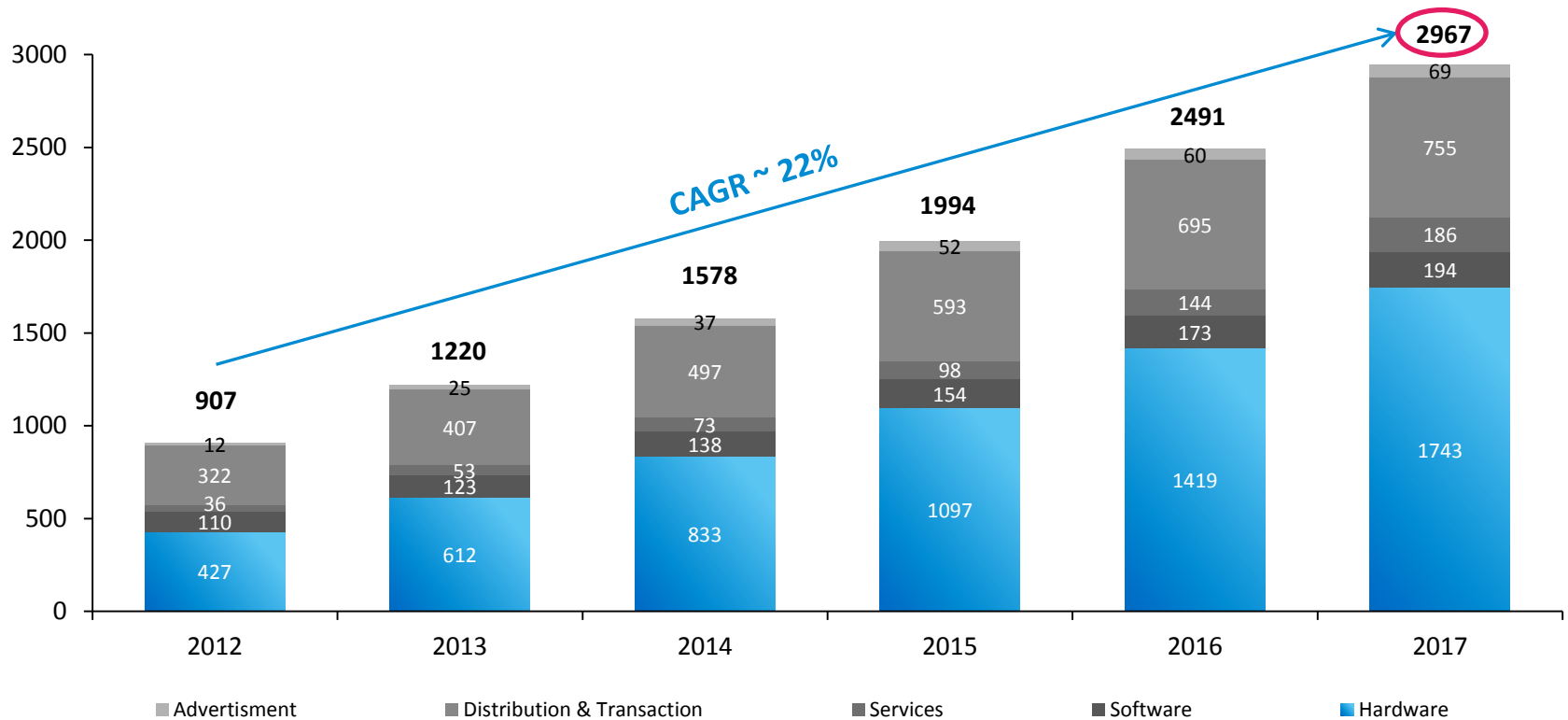
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Where do we stand?

Growth Market m(obile)Health

The German mHealth market will grow to around EUR 3 billion in 2017

Projected development of the mHealth market in Germany through 2017 (in EUR million)



Source: A.T. Kearney 2013

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Fitness Trackers

Great acceptance in the on the consumer level



31 % of Germans use fitness trackers to monitor their vital signs.

Health Apps

Great acceptance in the on the consumer level



**30 % of Germany's
smartphone users install
health apps.**

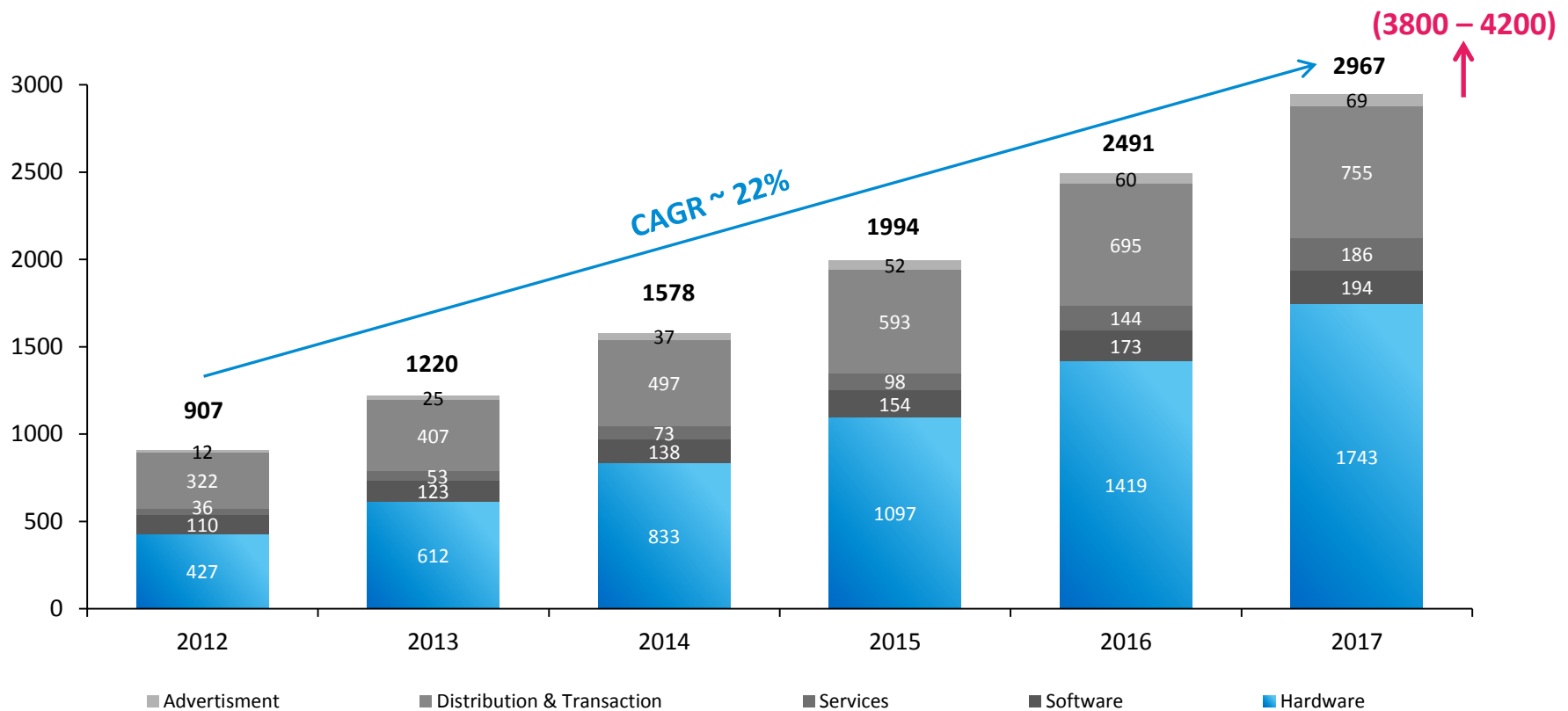
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What is the problem?

Growth Market m(obile)Health

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Projected development of the mHealth market in Germany through 2017 (in EUR million)



Source: A.T. Kearney 2013

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